

Town Center Loop Shuttle Service

Description: The overall purpose of this project is to establish transit service that provides frequent and convenient access to Town Center via shuttle buses. The project involves technical and financial feasibility analyses of loop shuttle bus service. Federal funds of \$971,779 have been earmarked to assist with purchase of transit vehicles for this program.

Mayor & Council Goal - Distinct Neighborhoods - One City

Date Created: 7/3/2006

Project Status: Open

Is this a CIP Project: Yes

Is this project included in the Quarterly Mayor and Council Review Meetings? Yes

	Project Team	Department
Manager	Emad Elshafei	Public Works
Team Members	Catherine Tuck Parrish Craig Simoneau Marylou Berg	City Manager Public Works

Is there a budget for this project that is separate from standard operating costs? **Yes**

Funding	FY07	FY08	FY09	FY10	FY11	Total
Planned	\$242,945					\$242,945
Revised						0
Expended to Date		\$242,945				\$242,945

LEGEND:

★ - Public Involvement

†† - Mayor and Council Action

				START			END		
	★	††	Tasks and Milestones	Planned	Revised	Actual	Planned	Revised	Actual
1	-	Y	Complete and submit report to Mayor & Council on preliminary study of feasibility for Town Center Shuttle	03/01/05	-	03/01/05	05/01/03	-	05/01/03
2	-	-	Receive notice of Federal funding approval for Bus and Bus-Related facilities for Town Center	02/01/05	-	02/01/05	02/01/05	-	02/01/05
3	-	Y	Mayor & Council direct staff to explore technical and financial possibility of acquiring and operating a shuttle in the City using federal funds	05/02/05	-	05/02/05	11/01/05	-	11/01/05
4	-	-	Meet with Mont. County Ride-On staff to discuss possible coordination for use of federal funds	04/29/05	-	04/29/05	06/07/06	02/01/07	03/15/07
5	-	Y	Worksession with Mayor & Council to present options for capital purchase and operational funding sources	01/17/06	-	07/31/06	01/17/06	-	07/31/06
6	-	-	Update and submit project scope to Federal Transit Administration (FTA)	08/07/06	-	08/07/06	08/18/06	-	08/18/06

7	-	-	Prepare project description and ensure that project is listed in regional Transportation Improvement Plan (TIP) and State TIP	08/21/06	-	08/21/06	12/31/06	-	12/31/06
8	-	-	County submits proposal to City to operate Town Center Shuttle-branded buses along Ride-On Rt. 45 and Maryland Ave. in Town Square	03/12/07	-	03/12/07	03/12/07	-	03/12/07
9	-	Y	Mayor & Council agree to County proposal, direct staff to prepare MOU w/County whereby County submits grant application and operates and maintains the vehicles	03/19/07	-	03/19/07	03/19/07	-	03/19/07
10	-	-	Staff prepare agreement with County to brand and operate shuttles	03/20/07	-	03/20/07	04/30/07	07/31/07	07/24/07
11	-	-	Staff coordinate transfer of federal (FTA) funds to Montgomery County/Maryland Transit Administration	03/20/07	-	03/20/07	05/30/07	12/14/07	12/17/07
12	-	Y	Branding and naming of the shuttle	01/01/08	-	01/03/08	09/01/08	09/01/08	-
13	-	-	Town Center Shuttles begin to operate along Ride-On Route 45	09/07/08	-	-	09/07/08	-	-

LEGEND:

★ - Public Involvement

☐ - Mayor and Council Action

Notes In Spring 2005, the City explored the possibility of using Town Center shuttle funds for some part of the Town Square public improvements, but since Town Center construction began in 2004, federal funds were no longer eligible and, therefore, Town Center shuttle funds could not be transferred for public improvements. City staff met with Montgomery County Ride-On staff several times in 2005-2007. In March 2007, Montgomery County offered to operate and maintain six (five operating and one backup) Town Center Shuttle-branded vehicles along the existing Ride-On Route 45, and to divert the route to serve Maryland Avenue in Town Square. Mayor and Council then directed staff to develop an agreement with the County to support the proposed operations. In late summer 2007, the grant was awarded by FTA, and issued - via MTA - to Montgomery County, the grant sub-recipient. The City paid the required 20% match to acquire the vehicles, and started discussion on the branding process.



Refuse and Recycling Program Implementation

Description: Implement citywide semi-automated, once-per-week refuse; single stream recycling; and call-on-demand bulk collections based on a decision by the Mayor and Council at its December 17, 2007 meeting. The implementation will be in three month phases, spanning 12-15 months, beginning October 2008.

Mayor & Council Goal - Distinct Neighborhoods - One City

Date Created: 1/4/2008

Project Status: Open

Is this a CIP Project: No

Is this project included in the Quarterly Mayor and Council Review Meetings? Yes

	Project Team	Department
Manager	Craig Simoneau	Public Works
Team Members	Anthony Frazier Jason Bible Jim Woods Marylou Berg Pat Stroud Raymond Foreman Susan Fournier Tisha Powell	Public Works City Manager

LEGEND:

* - Public Involvement

† - Mayor and Council Action

	*	†	Tasks and Milestones	START			END		
				Planned	Revised	Actual	Planned	Revised	Actual
1	-	Y	Mayor and Council decision to implement citywide, semi-automated, curbside, once-per-week refuse single stream recycling, and yardwaste; and call-on-demand bulk and hazardous pickup.	12/17/07	-	12/17/07	12/17/07	-	12/17/07
2	-	-	Transition "Pilot" neighborhoods back to once-per-week refuse collection.	01/28/08	-	01/28/08	01/28/08	-	01/28/08
3	-	Y	Establish contract with hauling company.	02/04/08	-	02/04/08	05/05/08	-	06/16/08
4	-	Y	Procurement of vehicles/equipment.	02/04/08	-	02/04/08	05/01/09	-	-
5	-	-	Program planning and develop customer service materials (incl new guide).	03/03/08	-	03/03/08	07/25/08	-	-
6	-	-	Route planning and phasing.	03/17/08	-	03/17/08	08/30/08	-	-
7	Y	-	Citywide implementation of Phases, including informational packets to residents; public outreach/meetings; ordering, assembling, and delivering carts; and customer resolution.	08/13/08	-	-	08/28/09	-	-

8	Y	-	Phase I begins (first week of collection).	10/20/08	-	-	10/24/08	-	-
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LEGEND:

- ★ - Public Involvement
- ☞ - Mayor and Council Action

Notes As the number of Phases and routes are determined, additional milestones will be added.

Stormwater Management Utility Implementation

Description: Prepare legislation, conduct public outreach, and prepare billing system for implementation of Stormwater Management (SWM) Utility Fee and new SWM and storm drainage program elements.

Mayor & Council Goal – Green City

Date Created: 12/8/2006

Project Status: Open

Is this a CIP Project: No

Is this project included in the Quarterly Mayor and Council Review Meetings? Yes

	Project Team	Department
Manager	Lise Soukup	Public Works
Team Members	Craig Simoneau Nate Wall Stacey Tate Susan Straus	Finance Public Works

Is there a budget for this project that is separate from standard operating costs? **Yes**

Funding	FY07	FY08	FY	FY	FY	Total
Planned	\$152,000	0	0	0	0	\$152,000
Revised	\$112,600	\$80,000	0	0	0	\$192,600
Expended to Date	\$15,041	\$72,316	0	0	0	\$87,357

LEGEND:

★ - Public Involvement

†† - Mayor and Council Action

				START			END		
	★	††	Tasks and Milestones	Planned	Revised	Actual	Planned	Revised	Actual
1	-	-	Develop SWM Utility Implementation workplan, finalize consultant scope of work and hire AMEC as consultant.	12/11/06	-	12/11/06	02/12/07	-	03/14/07
2	Y	-	Develop SWM Fee Credits policy with staff, consultant, SAG and focus groups with non-residential owners/representatives.	01/22/07	04/02/07	04/02/07	03/12/07	08/31/07	09/07/07
3	-	-	Prepare draft revisions to City Ordinance Chapter 19 and SWM Regulations to enable the City to enact a SWM utility.	02/05/07	-	02/12/07	03/23/07	10/31/07	12/10/07
4	Y	-	Public information campaign - webpage, printed info, articles, presentations at CA/HOA meetings & public forums	03/01/07	-	02/12/07	10/30/09	-	-
5	-	Y	Mayor & Council General Session - Introduction of draft Ordinance and Regulations	04/09/07	11/19/07	12/17/07	04/16/07	11/26/07	12/17/07
6	Y	Y	Public Hearing for draft SWM Utility ordinance/regulations/rate schedule	04/23/07	02/04/08	02/04/08	04/30/07	02/04/08	02/04/08

7	-	Y	Mayor & Council Discussion & Instruction to staff	05/29/07	03/17/08	03/17/08	06/04/07	03/17/08	03/17/08
8	-	Y	Mayor & Council General Session - Adoption of SWM Utility Ordinance & Approval of Regulations and Rate Schedule Resolution	05/29/07	04/14/08	04/21/08	06/25/07	04/21/08	04/21/08
9	-	-	AMEC creates billing files; updates SWM cashflow model; calculates final rates and works with County to integrate City fee as line item on property tax bills	07/01/07	-	06/11/07	06/30/09	-	-
10	-	Y	Mayor and Council approve initial resolution to set SWM Utility Fee rate schedule	02/02/09	-	-	05/29/09	-	-
11	-	-	First SWM Utility bills sent to city owners via County on property tax bills	07/01/08	07/01/09	-	07/31/08	07/31/09	-
12	Y	-	Staff & AMEC handle customer inquiries & billing disputes from first billing cycle.	08/01/08	08/03/09	-	10/31/08	12/18/09	-

LEGEND:

★ - Public Involvement

††† - Mayor and Council Action

Notes M&C awarded Phase II to AMEC on March 12, 2007.

Zoning Ordinance Review and Revision

Description: This project provides a comprehensive review and revision of the City's Zoning Ordinance and related code changes to make it more user friendly, to modernize the zoning concepts, and to address issues related to development in residential neighborhoods.

Mayor & Council Goal - Quality Built Environment

Date Created: 7/3/2006

Project Status: Open

Is this a CIP Project: No

Is this project included in the Quarterly Mayor and Council Review Meetings? Yes

	Project Team	Department
Manager	Deane Mellander	Community Planning and Development Services
Team Members	Jim Wasilak Sondra Block Susan Swift	City Attorney Community Planning and Development Services

LEGEND:

★ - Public Involvement

☐ - Mayor and Council Action

	★	☐	Tasks and Milestones	START			END		
				Planned	Revised	Actual	Planned	Revised	Actual
1	-	-	Assemble staff resource team	-	-	-	05/01/05	-	06/01/05
2	-	Y	Mayor & Council adoption of FY06 budget	-	-	-	06/01/05	-	06/01/05
3	-	Y	Mayor & Council briefing on program outline	-	-	-	06/01/05	-	06/01/05
4	-	Y	Mayor & Council briefing on outreach program	-	-	-	09/01/05	12/12/05	12/12/05
5	Y	-	Public outreach - Phase I (Structure of Ordinance)	-	-	-	10/01/05	02/01/06	03/06/06
6	-	Y	Mayor & Council and Planning Commission briefing on Phase I outcomes	-	-	-	11/01/05	03/01/06	02/27/06
7	Y	Y	Mayor & Council appoint members of the Rockville Zoning Ordinance Review Committee (RORZOR)	-	-	-	-	02/27/06	02/27/06
8	-	-	RORZOR Committee review and comment on completed RORZOR draft ordinance	11/17/06	-	11/17/06	09/05/06	08/21/07	09/11/07
9	Y	-	RORZOR Committee review and comment on annotated ordinance outline	-	-	-	-	-	05/23/07
10	Y	Y	Public Forum	11/30/06	-	12/07/06	12/07/06	-	12/07/06
11	Y	Y	Mayor and Council authorization to file	-	-	-	04/01/07	09/17/07	10/08/07
12	Y	-	Public Information Meetings	03/01/07	10/08/07	10/16/06	08/31/07	01/09/08	-
13	Y	-	Public Forum 1	10/23/07	-	10/23/07	10/23/07	-	10/23/07

14	Y	-	Public Forum 2	11/15/07	-	11/15/07	11/15/07	-	10/15/07
15	Y	-	Public Forum 3	12/05/07	01/10/08	01/10/08	12/05/07	01/10/08	01/10/08
16	Y	-	Planning Commission public meetings on draft Ordinance	03/01/07	01/23/08	01/23/08	04/01/07	01/30/08	01/30/08
17	Y	-	Planning Commission worksessions and recommendations	-	03/05/08	03/05/08	07/01/07	05/21/08	05/21/08
18	-	-	Staff preparation of revised draft based on Planning Commission recommendations	03/15/08	04/21/08	04/21/08	04/01/08	05/21/08	05/21/08
19	-	-	Additional Pubic Outreach	03/26/08	-	03/26/08	05/30/08	-	05/30/08
20	-	-	Mayor and Council briefing on revised text and map	-	-	06/09/08	-	-	06/09/08
21	Y	Y	Mayor & Council public hearings	07/01/07	06/16/08	06/16/08	06/04/07	06/30/08	06/30/08
22	Y	Y	Public hearing record closes	05/23/08	08/04/08	-	05/23/08	08/04/08	-
23	-	Y	Mayor & Council worksession/Discussion & Instruction	-	07/07/08	07/07/08	08/01/07	08/04/08	-
24	-	Y	Introduction of resolution for adoption	07/21/08	09/08/08	-	07/28/08	09/08/08	-
25	-	Y	Adoption of new ordinance and new zoning map	06/30/08	09/15/08	-	06/30/08	09/15/08	-

LEGEND:

* - Public Involvement

✱ - Mayor and Council Action

Notes

In addition to routine updating, staff identified several substantial policy issues to be addressed in the revision. Staff has completed 'white papers' for these issues that require substantial background research and public input. Substantial policy issues include: Mansionization, optional method procedures, adequate public facilities, urban design, overlay zones or conservation districts, encroachments, non-conformities, and parking standards. The schedule for discussion of the policy issues with the Mayor & Council was:

9/19/05 - Urban design

9/27/05 - Optional methods and competing values

11/1/05 - Urban design follow up and competing values follow up

11/21/05 - Non-conformities

1/12/06 - Approving bodies, Special development procedures; Project overview

1/17/06 - Parking

1/26/06 - Uses follow up, Accessory structures and uses

2/2/06 - Green requirements, Sidewalks

2/28/06 - Overview II

03/6/06 - City Environmental Performance Standards

Rockville Pike Corridor Plan Update - Planning Implementation

Description: This project will result in a revised Rockville Pike Corridor Neighborhood Plan. The existing Plan, which was adopted in 1989, envisions a mixed-use corridor with urban design elements to enhance the appearance of the planning area. The revised plan will address Mayor and Council goals and objectives, including improved pedestrian circulation and transportation facilities

Mayor & Council Goal - Quality Built Environment

Date Created: 4/23/2007

Project Status: Open

Is this a CIP Project: No

Is this project included in the Quarterly Mayor and Council Review Meetings? Yes

	Project Team	Department
Manager	Mayra Bayonet	Community Planning and Development Services
Team Members	Ann Wallas Dwayne Jenkins Gladys Ayala Hjarman Cordero Jeremy Hurlbutt Jim Wasilak Manisha Tewari Nancy Williams Nazar Saleh Nicole Walters	City Manager Community Planning and Development Services Public Works

Is there a budget for this project that is separate from standard operating costs? **Yes**

Funding	FY05	FY06	FY07	FY08	FY09	Total
Planned				\$300,000	\$197,960	\$497,960
Revised						0
Expended to Date				\$211,496		\$211,496

LEGEND:

★ - Public Involvement

☞ - Mayor and Council Action

				START			END		
	★	☞	Tasks and Milestones	Planned	Revised	Actual	Planned	Revised	Actual
1	-	-	Assemble Staff Resource Team	06/28/07	-	-	07/13/07	-	09/04/07
2	-	Y	Noticed to Proceed	06/26/07	-	-	09/10/07	-	09/10/07
3	-	-	Update web page-Ongoing Process	06/20/07	-	-	06/25/09	-	-
4	Y	-	Continue outreach program-Ongoing process	06/19/07	-	-	06/26/09	-	-
5	-	-	Work Program Refinement/Consultant	09/06/07	-	-	09/11/07	09/27/07	09/27/07
6	-	-	Project Management Plan/Consultant	09/06/07	-	-	09/27/07	10/11/07	10/11/07
7	-	-	Plan Outreach/Consultant Management Plan	09/25/07	-	-	09/27/07	10/11/07	10/11/07
8	-	-	Study Area Tour/Consultant	09/11/07	-	-	09/11/07	-	09/11/07

9	-	-	Briefing from Relevant City Agencies (1)/Consultant	10/09/07	-	10/09/07	10/23/07	-	10/11/07
10	-	-	Briefing from Relevant Agencies (2)/Consultant	10/09/07	-	10/09/07	11/13/07	-	11/13/07
11	Y	-	Project Kick Off/Consultant	11/27/07	-	12/04/07	12/04/07	-	12/04/07
12	-	-	Project Kick-off Summary Report	12/19/07	-	-	12/19/07	-	12/19/07
13	Y	-	Stakeholders Interviews with ACP/Consultant (ongoing)	11/01/07	11/14/07	11/14/07	01/22/08	06/02/08	06/02/08
14	Y	-	Stakeholders Workshop	02/12/08	02/26/08	02/26/08	02/12/08	02/26/08	02/26/08
15	-	-	Stakeholders Workshop Report	03/14/08	-	03/14/08	03/14/08	-	03/14/08
16	Y	-	First Report to the Community	03/18/08	-	03/18/08	03/18/08	-	03/18/08
17	-	-	First Report to the Community Report	04/11/08	-	04/11/08	04/11/08	-	04/11/08
18	Y	-	Second Report to the Community/ERA	05/06/08	-	05/06/08	05/06/08	-	05/06/08
19	-	-	Second Report to the Community Report	05/20/08	-	05/20/08	05/20/08	-	05/20/08
20	Y	-	Design Charrette -5 days	07/08/08	05/31/08	05/31/08	07/12/08	06/04/08	06/04/08
21	Y	-	Design Charrette Results Meeting	06/03/08	-	06/03/08	06/03/08	-	06/03/08
22	Y	-	Third Report to the Community meeting	06/03/08	-	06/03/08	06/03/08	-	06/03/08
23	-	-	Charrete Summary Report	06/18/08	-	06/16/08	06/18/08	-	06/16/08
24	Y	-	Preliminary Analysis and Recommendations	07/24/08	-	-	07/24/08	-	-
25	-	-	Preliminary Draft for Staff Review	07/31/08	-	-	07/31/08	-	-
26	-	-	Second Draft	09/09/08	-	-	09/09/08	-	-
27	Y	-	Third Report to the Community	09/18/08	-	-	09/18/08	-	-
28	-	Y	Joint Presentation Status Reports to Mayor and Council/Planning Commission	09/22/08	-	-	09/22/08	-	-
29	Y	-	Planning Commission Public Hearing	11/12/08	-	-	11/12/08	-	-
30	Y	-	Fourth Report to the Community	12/09/08	-	-	12/09/08	-	-
31	-	-	Status Report to Planning Commission	01/14/09	-	-	01/14/09	-	-
32	-	-	Third Draft	01/07/09	-	-	01/07/09	-	-
33	-	-	Revised Draft that Included Planning Commission Addendum. Action and Recommendation	01/28/09	-	-	01/28/09	-	-
34	Y	Y	Mayor and Council Public Hearing	02/09/09	-	-	02/09/09	-	-
35	-	-	Presentation and Status Reports(ongoing)	09/02/08	-	-	03/03/09	-	-

36	-	Y	Mayor and Council Discuss Plan	03/09/09	-	-	03/09/09	-	-
37	-	-	Final Document of the Rockville Pike Corridor Plan	03/02/09	-	-	03/02/09	05/15/09	-
38	-	Y	Mayor and Council Plan Adoption- Final Report	05/25/09	-	-	05/25/09	-	-

LEGEND:

★ - Public Involvement

✚ - Mayor and Council Action

Notes

This Plan includes the Twinbrook Metro Area.

The web page updates will be on-going.

On September 5, 2006, representatives from Maryland National Capital Park & Planning Commission (MNCPPC), Gaithersburg, and Rockville met to discuss various planning projects in the MD 355 & I-270 corridor. The result of the meeting was that the three jurisdictions agreed to work together to draft a common vision for the MD 355 & I-270 corridor. City staff continues to share information and ideas with M-NCPPC and the City of Gaithersburg on comprehensive planning along the MD 355 and I-270 corridors. Staff attended a Planning Board worksession on this topic on October 4, 2007. Staff will continue the coordination and will keep the Mayor and Council informed.

College Gardens Park/Pond

Description: Final design and construction of a stormwater management pond and new or replaced park features including basketball courts, playground equipment and park shelter building. This project is funded by a Water Resources CIP project under Dept. of Public Works and a separate CIP project under Recreation and Parks Dept. City staff is working with a task force of community members to finalize the site layout and details.

Mayor & Council Goal - Quality Built Environment

Date Created: 2/7/2007

Project Status: Open

Is this a CIP Project: Yes

Is this project included in the Quarterly Mayor and Council Review Meetings? Yes

	Project Team	Department
Manager	Lise Soukup	Public Works
Team Members	Marylou Berg Mike Critzer Susan Straus	City Manager Public Works Recreation and Parks

Is there a budget for this project that is separate from standard operating costs? **Yes**

Funding	FY07	FY08	FY09	FY	FY	Total
Planned	\$182,055	\$1,813,573	0	0	0	\$1,995,628
Revised	0	0	0	0	0	0
Expended to Date	\$69,553	\$32,719	0	0	0	\$102,272

LEGEND:

★ - Public Involvement

☐ - Mayor and Council Action

	★	☐	Tasks and Milestones	START			END		
				Planned	Revised	Actual	Planned	Revised	Actual
1	-	-	Prepare 60% complete final engineering and architectural plans	02/01/07	-	-	04/30/07	-	06/05/07
2	Y	-	College Gardens Task Force Meeting to review 60% plans after getting outside agency comments (sediment control, forest conservation, pond design & stream restoration plans)	06/01/07	-	-	06/30/07	-	06/25/07
3	-	-	Prepare 80% complete final engineering & architectural plans. Includes addressing outside permitting agency comments.	05/01/07	07/09/07	07/09/07	08/31/07	10/31/07	11/16/07
4	Y	-	Public Meeting - view engineering & architecture plans.	09/01/07	10/04/07	10/04/07	09/30/07	10/04/07	10/04/07
5	-	-	Prepare 100% complete final engineering & architectural plans & specifications. Obtain permits for construction.	10/01/07	11/01/07	11/19/07	11/30/07	06/30/08	-
6	-	Y	Construction Bid process - advertise, review & select contractor & execute contract.	12/01/07	06/30/08	-	03/31/08	10/13/08	-

7	-	-	Construction of College Gardens Park and Pond improvements.	05/01/08	11/10/08	-	04/30/09	08/31/09	-
8	-	-	Construction of stream restoration downstream of Princeton Place.	07/01/08	11/01/08	-	08/31/08	02/28/09	-

LEGEND:

★ - Public Involvement

☞ - Mayor and Council Action

Notes Funding shows this project's combined SWM and Parks CIP costs for final design in FY07 and construction in FY08. Costs for previous projects (College Gardens Low Impact Design Study and College Gardens Park/Pond Concept Design) are excluded since they were tracked in earlier project tracking sheets.

Mattie J.T. Stepanek Park

Description: This project designs/constructs a new City park featuring a mix of neighborhood-type park amenities (playgrounds, walking/jogging paths, picnic area, shade gazebo, fitness cluster, sand volleyball, landscaped areas, basketball and tennis courts with lighting, "Bankshot" basketball court); and amenities designed for City-wide use (2 rectangular sports fields with lighting, a dog park). The park will include 240 parking spaces with vehicular access from Pleasant Rd. The park will host the practices and games of the Rockville Football League (youth) beginning in Fall 2009.

Mayor & Council Goal - Quality Built Environment

Date Created: 7/1/2006

Project Status: Open

Is this a CIP Project: Yes

Is this project included in the Quarterly Mayor and Council Review Meetings? Yes

	Project Team	Department
Manager	Burt Hall	Recreation and Parks
Team Members	Christine Henry Chuck Miller Dianne Fasolina Jerry Daus Jill Hall Martha Coester Mike Critzer Phil Bryan Rob Orndorff Steve Mader	Recreation and Parks

Is there a budget for this project that is separate from standard operating costs? **Yes**

Funding	FY06	FY07	FY08	FY09	FY10	Total
Planned	\$1,663,702	\$324,000	\$668,430	\$575,382	\$207,618	\$3,439,132
Revised	\$1,833,167	\$804,000	\$850,341	\$575,382	\$207,618	\$4,270,508
Expended to Date	\$376,495	\$2,015,908	\$9,050			\$2,401,453

LEGEND:

★ - Public Involvement

☞ - Mayor and Council Action

				START			END		
	★	☞	Tasks and Milestones	Planned	Revised	Actual	Planned	Revised	Actual
1	-	-	Advertise RFP for park design contract	01/01/03	-	01/01/03	01/01/03	-	01/01/03
2	-	-	Receive park design proposals	03/01/03	-	03/01/03	03/01/03	-	03/01/03
3	-	Y	Mayor & Council approve bid award for park design	04/01/03	-	04/01/03	04/01/03	-	04/01/03
4	-	-	Notice to proceed to consultant	05/01/03	-	05/01/03	05/01/03	-	05/01/03
5	Y	-	Citizen survey on park design and amenities	07/01/03	-	07/01/03	09/01/03	-	09/01/03
6	-	-	Concept design phase	10/01/03	-	10/01/03	03/01/04	-	03/01/04
7	Y	-	Public meeting to receive citizen comments on park design	05/03/04	-	05/03/04	05/03/04	-	05/03/04
8	-	-	Final Phase I bid drawings complete	11/01/04	06/01/05	06/01/05	-	08/01/05	09/20/05

9	-	-	Advertise construction bids - Phase I of park construction	01/03/05	07/01/05	07/01/05	-	10/03/05	09/30/05
10	-	Y	Mayor and Council Award construction contract - Phase I	03/01/05	09/01/05	09/01/05	11/01/05	01/09/06	01/09/06
11	-	-	Phase I construction - FY 07 (includes dog park)	03/01/05	01/03/06	05/11/06	12/01/05	05/30/07	05/25/07
12	-	-	Phase II, III & IV Design	07/03/06	08/01/06	08/01/06	09/01/06	01/15/08	06/06/08
13	Y	Y	Install "bankshot" court.	07/27/09	07/28/08	-	10/31/09	09/30/08	-
14	-	-	Phase II construction - FY08: Install lighting for parking lots, football fields basketball/tennis courts, and pathways; Construct snack bar/restroom/storage building; Landscaping; Peace Garden.	11/01/06	08/04/08	-	11/01/07	12/30/08	-
15	-	-	Install Mattie Sculpture	07/01/07	09/01/08	-	04/01/08	10/01/08	-
16	Y	Y	Park Dedication	04/26/09	-	-	04/26/09	-	-
17	-	-	Phase III construction - FY 09: Construct second and third bays of main parking lot and small parking lot off Gaither Road; Install scoreboard, bleachers and softball backstop; Landscaping	11/01/09	08/04/08	-	06/01/10	12/30/08	-

LEGEND:

* - Public Involvement

- Mayor and Council Action

Notes Increases in Maryland Program Open Space (POS) Funding have made it possible to increase total POS funding to \$1,690,110 for this project. The construction schedule has been accelerated to complete the first two major project phases by the end of FY 2008.

04/06/07 "Expended To Date" modified to show only Expended funds, not Encumbered. Phase 2 Design, Athletic Court, Playground and Dog Park Pavilion construction have been encumbered.

Thomas Farm Community Center

Description: This project designs and constructs a community recreation center in the Fallsgrove area. The concept plan for the center includes a gymnasium, two multipurpose rooms, fitness center, game room, patio, locker rooms, kitchenette, offices, storage and parking.

Mayor & Council Goal - Quality Built Environment

Date Created: 7/1/2006

Project Status: Open

Is this a CIP Project: Yes

Is this project included in the Quarterly Mayor and Council Review Meetings? Yes

	Project Team	Department
Manager	Burt Hall	Recreation and Parks
Team Members	Christine Henry Jerry Daus Jill Hall Lew Dronenburg Martha Coester Mike Critzer Neal Owens Phil Bryan Rob Orndorff Steve Mader	Recreation and Parks

Is there a budget for this project that is separate from standard operating costs? **Yes**

Funding	FY05	FY06	FY07	FY08	FY	Total
Planned	\$336,000	\$3,000,000				\$3,336,000
Revised	\$336,000	\$3,245,000	\$1,983,858	\$100,000		\$5,664,858
Expended to Date	\$68,687	\$42,398	\$163,841	\$808,600		\$1,083,526

LEGEND:

★ - Public Involvement

☞ - Mayor and Council Action

	★	☞	Tasks and Milestones	START			END		
				Planned	Revised	Actual	Planned	Revised	Actual
1	-	-	Advertise RFP for design consultant	09/01/04	12/01/04	12/01/04	09/01/04	-	12/01/04
2	-	-	Receive proposals	10/01/04	03/01/05	03/04/05	-	-	03/04/05
3	-	Y	Mayor & Council award contract	11/01/04	04/01/05	05/02/05	12/01/04	05/02/05	05/02/05
4	-	-	Notice to Proceed to design consultant	12/01/04	05/02/05	05/02/05	12/01/04	05/02/05	05/02/05
5	Y	-	Letter to nearby civic associations with info on public input opportunities	03/01/05	-	03/01/05	03/01/05	-	03/01/05
6	-	-	Public meeting #1 to receive citizen comments on design alternatives (focus on programming)	01/10/05	06/09/05	06/09/05	01/10/05	06/09/05	06/09/05
7	-	-	Concept design phase	12/01/04	05/02/05	05/02/05	02/01/05	10/03/05	12/20/05
8	Y	-	Implement two online surveys to gather additional feedback from the public	06/01/05	07/01/05	07/01/05	10/03/05	03/01/06	03/01/06

9	Y	-	Public meeting #2 (focus on design schemes)	03/01/05	10/05/05	10/05/05	03/01/05	10/05/05	10/05/05
10	-	-	Design development phase	05/02/05	10/06/05	10/06/05	09/01/05	01/16/06	04/14/06
11	-	-	Development Review Committee (DRC) review of design/detailed application	02/06/06	04/13/06	04/13/06	02/06/06	05/11/06	05/18/06
12	-	-	Resubmit to DRC	10/12/06	10/05/06	10/05/06	10/12/06	10/05/06	10/05/06
13	Y	-	Planning Commission action on Use Permit Application	03/01/06	10/25/06	11/01/06	03/01/06	10/25/06	11/01/06
14	-	-	Complete construction documents and bid documents	05/02/05	-	05/02/05	06/05/06	06/29/07	07/11/07
15	-	-	Advertise construction bids	06/30/06	07/18/07	07/18/07	06/30/06	07/18/07	07/18/07
16	-	-	Pre-Bid Meeting	04/11/07	08/07/07	08/07/07	08/07/07	08/07/07	08/07/07
17	-	-	Bid Opening	01/10/07	08/21/07	08/28/07	01/10/07	08/21/07	08/28/07
18	-	Y	Mayor & Council award contract	06/05/06	09/24/07	09/24/07	06/05/06	09/24/07	09/24/07
19	-	-	Mobilize: tree/silt fence, constr. road, trailer, strip soil.	10/31/07	-	10/31/07	-	-	11/12/07
20	-	-	Foundation: footings, slab.	11/12/07	-	11/12/07	01/16/08	-	02/06/08
21	-	-	Wall erection: steel / masonry	01/17/08	-	02/15/08	03/20/08	-	06/27/08
22	-	-	Roof	03/26/08	-	05/08/08	04/30/08	07/18/08	-
23	-	-	Wall close in - drywall, paint	04/29/08	-	04/29/08	06/27/08	-	-
24	-	-	Utilities on line / test	06/09/08	-	06/09/08	07/08/08	-	-
25	-	-	Ceiling / Floor coverings / millwork	07/09/08	-	-	08/25/08	-	-
26	-	-	Fit Out: hardware, accessories, HVAC comm.	08/28/08	-	-	10/13/08	-	-
27	-	-	Construction: Substantial completion	12/15/08	-	-	12/15/08	-	-
28	Y	Y	Facility dedication	01/17/09	-	-	01/17/09	-	-

LEGEND:

★ - Public Involvement

☞ - Mayor and Council Action

Notes Increases in Maryland Program Open Space Funding and a Maryland Bond Bill have made it possible to add \$1,083,858 in grant funding to this project. The Falls Grove developer also contributed a grant of \$45,000 to be used for site amenities. Given price increases for building materials, fuel, etc. this additional funding will help ensure that the project can be constructed as planned and within budget.

Interaction with Boards and Commissions

Description: This project responds to the Mayor and Council's request to review: the authority of boards and commissions, coordination among boards and commissions, process for filling board and commission vacancies, and the qualifications of board and commission members. The work will begin with updating the 2006 report on City boards and commission. Additional steps will be identified after a worksession to obtain more direction from the Mayor and Council.

Mayor & Council Goal - Exceptional City Services

Date Created: 6/13/2008

Project Status: Open

Is this a CIP Project: No

Is this project included in the Quarterly Mayor and Council Review Meetings? Yes

	Project Team	Department
Manager	Claire Funkhouser	City Clerk
Team Members	Sara Louise Ferrell	

LEGEND:

★ - Public Involvement

☞ - Mayor and Council Action

	★	☞	Tasks and Milestones	START			END		
				Planned	Revised	Actual	Planned	Revised	Actual
1	-	-	Meet with Boards and Commissions as requested by the Mayor and Council, including Sister City, Environment, Traffic and Transportation, Human Rights and Board of Elections	06/30/08	-	-	-	-	-
2	-	-	Update report from 2006, including information from Boards and Commissions about Accomplishments for FY2008 and Goals for FY 2009	07/15/08	-	-	09/15/08	-	-

LEGEND:

★ - Public Involvement

☞ - Mayor and Council Action


Notes



City of Rockville
MEMORANDUM

April 15, 2008

TO: Scott Ullery, City Manager

FROM: Gavin Cohen, Director of Finance 

SUBJECT: Senior Residential Property Tax Deferral

In response to the Mayor and Council's request, attached please find the State of Maryland's enabling legislation section 10-204.2 entitled Deferral of municipal corporation property tax-Elderly or disabled homeowners. Staff has also attached Montgomery County's enabling legislation Section 52-18F and Maryland HB 7 from the 2006 legislative session that has a good overall description of a deferral program as it relates to Charles County.

As one can see under section (c) of the code section, the Mayor and Council has a wide discretion over the parameters that are established for a deferral program that is further reinforced by seeing what other jurisdictions are doing in this area.

In contemplating a program, we should take into account the following:

- It puts the government into the loan business
- There is no tax relief, just cash flow relief
- Other surrounding jurisdictions have low participation rates
- The City administratively is not set up to handle a program of this nature and we would be relying on Montgomery County to administer it on the City's behalf

Montgomery County does the property tax billing on behalf of the City. Any deferral program that the Mayor and Council wish to implement would require that Montgomery County participate in the administration of the program as it's a requirement under section (e) that "The governing body of a municipal corporation.....shall specify the cumulative amount of the deferral and related interest in the taxpayer's annual property tax bill." The best way of getting a program implemented, especially if we are reliant on the County would be to adopt the same program as the County, and request that they administer it on the City's behalf. Staff has contacted the Treasury Office at the County and requested that they let us know what would be involved in setting up a deferral program for the City.

Attachments:

1. Annotated Code of Maryland Section 10-204.2
2. HB 7 – Charles County – Property Tax – Payment Deferral
3. Montgomery County Code Section 52-18F

(5) that any mortgagee or beneficiary under a deed of trust be entitled to receive notice of the deferral and of the amount of tax to be deferred; and

(6) the level of income to determine eligibility for the payment deferral under subsection (a) of this section.

(d) *Payment due date.* — The county property tax that is deferred under this section and any interest specified in subsection (c)(4) of this section are due when the deferral ends as specified in subsection (c)(3) of this section or immediately upon transfer of ownership of the property for which the property tax has been deferred.

(e) *Amount of deferral and interest.* — The governing body of Montgomery County shall specify the cumulative amount of the deferral and related interest in the taxpayer's annual property tax bill.

(f) *Liens.* — A lien shall attach to the property in the amount of all deferred taxes and interest. The lien shall remain attached until the deferred taxes and interest are paid.

(g) *Written agreements.* — The governing body of Montgomery County shall authorize the deferral by written agreement. The agreement shall reflect the terms and conditions of the deferral, including notice of the lien. The agreement shall be recorded in the land records of the county.

(h) *Penalties.* — Penalties may not be charged during the period of the deferral on any tax payments deferred under this section. (1990, ch. 652; 1992, ch. 22, § 1.)

§ 10-204.2. Deferral of municipal corporation property tax — Elderly or disabled homeowners.

(a) *Authorization.* — Notwithstanding Subtitle 1 of this title, the governing body of a municipal corporation may authorize, by law, a payment deferral of municipal corporation property tax for residential real property occupied as the principal residence of the owner.

(b) *Eligibility.* — An owner is eligible for a payment deferral under subsection (a) of this section if the owner or at least 1 of the owners:

(1) has resided in the dwelling for a period of at least 5 consecutive years;

(2) (i) is at least 65 years of age;

(ii) has been found permanently and totally disabled and has qualified for benefits under:

1. the Social Security Act;

2. the Railroad Retirement Act;

3. any federal act for members of the United States armed forces; or

4. any federal retirement system; or

(iii) has been found permanently and totally disabled by a county health officer or the Baltimore City Commissioner of Health; and

(3) meets the income eligibility requirements determined under subsection (c) of this section.

(c) *Terms, conditions, etc.* — The governing body of a municipal corporation that authorizes a payment deferral under subsection (a) of this section shall specify:

(1) the amount of the tax that may be deferred, not exceeding the increase in the municipal corporation property tax from the date the taxpayer elects to defer the payment of the tax;

(2) restrictions on the amount of the real property eligible for a payment deferral under subsection (a) of this section, except that the amount of eligible property may not be less than the dwelling and curtilage, as determined by the supervisor;

(3) the duration of the payment deferral under subsection (a) of this section;

(4) the rate of interest to be paid on the municipal corporation property tax payment from the due date without a deferral until the date that the municipal corporation property tax is paid;

(5) that any mortgagee or beneficiary under a deed of trust be entitled to receive notice of the deferral and of the amount of tax to be deferred; and

(6) the level of income to determine eligibility for the payment deferral under subsection (a) of this section.

(d) *Payment due date.* — The municipal corporation property tax that is deferred under this section and any interest specified in the law authorizing the deferral are due when the deferral ends as specified in the law authorizing the deferral.

(e) *Amount of deferral and interest.* — The governing body of a municipal corporation that authorizes a payment deferral under subsection (a) of this section shall specify the cumulative amount of the deferral and related interest in the taxpayer's annual property tax bill.

(f) *Liens.* — A lien shall attach to the property in the amount of all deferred taxes and interest. The lien shall remain attached until the deferred taxes and interest are paid.

(g) *Written agreements.* — The governing body of a municipal corporation that authorizes a payment deferral under subsection (a) of this section shall authorize the deferral by written agreement. The agreement shall reflect the terms and conditions of the deferral including notice of the lien. The agreement shall be recorded in the land records of the county.

(h) *Penalties.* — Penalties may not be charged during the period of the deferral on any tax payments deferred under this section. (1992, ch. 584.)

§ 10-204.3. Semiannual payment schedule for property tax.

(a) *"Owner-occupied residential property" defined.* — In this section, "owner-occupied residential property" means the principal residence of a homeowner as defined in § 9-105 of this article.

(b) *Semiannual schedule authorized.* — Notwithstanding Subtitle 1 of this title:

(1) the governing body of a county shall provide a semiannual payment schedule for State, county, and special taxing district property taxes due on owner-occupied residential property; and

Department of Legislative Services
Maryland General Assembly
2006 Session

FISCAL AND POLICY NOTE
Revised

House Bill 7

(Charles County Delegation)

Ways and Means

Budget and Taxation

Charles County - Property Tax - Payment Deferral

This bill authorizes Charles County to provide, by law, a payment deferral of the county property tax for residential real property occupied as the principal residence of the owner, provided that at least one of the owners has lived in the dwelling for the previous five years and meets specified age and income requirements.

The bill takes effect June 1, 2006 and is applicable to all taxable years beginning after June 30, 2006.

Fiscal Summary

State Effect: None.

Local Effect: Potential minimal decrease in Charles County property tax revenues during any deferral period. The amount of any revenue decrease depends on the nature of the deferral program that is established and the number of participants in a given year. Revenues would increase upon repayment. County expenditures would not be affected.

Small Business Effect: None.

Analysis

Bill Summary: The bill requires Charles County to specify the following criteria if a deferral program is authorized: (1) a minimum age requirement; (2) the amount of tax that may be deferred and the duration of the deferral; (3) restrictions on the amount of real property eligible for a payment deferral; (4) the interest rate; (5) a requirement that

any mortgagee or beneficiary under a deed of trust receive specified notification; and (6) income eligibility.

The bill also provides for other requirements and criteria related to the administration of property tax deferral payments in Charles County, including: (1) a requirement that the cumulative amount of the tax deferral and interest be included in the taxpayer's annual property tax bill; (2) a lien must be attached to the property in the amount of all deferred taxes and interest and must remain until all deferred taxes and interest are paid; and (3) the deferral must be authorized by a written agreement reflecting the terms and conditions of the deferral. Finally, the bill provides that penalties may not be charged during the deferral period on deferred taxes.

Current Law: Tax – Property Article § 10-204 authorizes counties and municipal corporations to defer the payment of the increase in county and municipal property taxes for owner-occupied residential real property of an elderly or disabled homeowner, for property that is the principal residence of the individual.

Statute provides specified age and eligibility requirements (at least 65 years of age, living in the home for at least five years, and/or permanently or totally disabled). The law also provides for the procedures that local governments must follow when implementing a property tax deferral program, including payment dates, amounts of deferral and interest to be reported on annual tax bills, lien provisions, and penalties.

Background: Property tax deferral programs typically give low-income elderly homeowners the opportunity to defer payment of property taxes. Under most deferral programs, deferred property taxes become a lien against the value of the taxpayer's home. When the home is sold, any back taxes and interest are then due. If the homeowner dies, deferred taxes must be paid upon settlement of the estate.

Several Maryland counties offer a property tax deferral program for senior citizens and other special categories of homeowners. **Exhibit 1** provides a brief summary of each local program.

The State Department of Assessments and Taxation (SDAT) and the counties have indicated that only a small number of taxpayers have used the property tax deferral programs noted above. One reason given is that the associated interest rates are often in the 8% to 10% range and are therefore considered prohibitive by some taxpayers. For example, the Montgomery County Council has recently changed its program by reducing its interest rate from 9% to an amount set annually that does not exceed the prime lending rate available at the time. In addition, the county also increased the gross income limitation from \$60,000 to \$120,000. However, it should be noted that interest rates in the 8% to 10% are similar to rates charged in other states for tax deferral programs.

Exhibit 1
Summary of Local Property Tax Deferral Programs

<u>Jurisdiction</u>	<u>Program Summary</u>
Anne Arundel	Deferred tax payment program for owner-occupied homes of elderly (65 and over) or disabled individuals. Gross income limit of \$30,000. The program allows for a 50-year payment deferral; the amount deferred may not exceed the increase in county property taxes on the date of deferral. Interest accrues at 6% annually.
Baltimore County	Deferred tax payment program for owner-occupied homes of elderly or disabled individuals who have experienced a financial hardship. Since owner-occupied properties are eligible for a homestead credit (4% in Baltimore County), only 4% of the increase can be deferred. Interest accrues at 9% annually.
Frederick	Deferred payment of the increase in property tax plus 3% interest.
Harford	Tax deferral program based on a change in homeowner's financial situation (unemployment, medical hardship, etc.).
Howard	Program for property owners ages 65 and over who have lived in their current dwelling for the previous five years. Income cannot exceed \$75,000.
X Montgomery	Program based on household income, rather than age. Specified residents may defer any tax increase in taxes over the tax liability at the time of the deferral. The homeowner must have resided at the property for five years and have a gross income of less than \$120,000. The deferral may not exceed 50% of the value of the property. The interest rate is based on the prime rate.
Prince George's	Deferred tax payment program for owner-occupied homes of elderly or disabled individuals. Gross income may not exceed \$45,000 in the prior year. Deferred taxes may not exceed the increase in the county property tax rate from the date of deferral. The full amount of deferred taxes and interest may not exceed 50% of the full cash value of the property. Interest accrues at 9% annually.
Queen Anne's	Deferred tax payment program for owner-occupied homes of elderly or disabled individuals. The program allows for a 50-year payment deferral equal to but not exceeding the increase in county property taxes on eligible real property taxes on the date of deferral. Interest accrues at 2% annually.
Salisbury	The City of Salisbury grants tax deferrals to developments that offer housing to seniors or families with low or moderate incomes – the taxes are deferred to a later date.

Source: Maryland Association of Counties, State Department of Assessments and Taxation, Department of Legislative Services

Other States

Property tax deferral programs exist in 24 states and the District of Columbia. However, in six of these states, programs are provided at the option of local governments. In some states, the deferral of all property taxes due is allowed, while in others, only a portion may be deferred so that property tax bills do not increase by more than a specified percentage.

Exhibit 2 provides a summary of tax deferral programs in surrounding states as provided in the National Conference of State Legislatures report noted above, as updated by Legislative Services.

Exhibit 2 Property Tax Deferral Programs in Nearby States

<u>State</u>	<u>Age Limit</u>	<u>Income Cap</u>	<u>Description</u>
Delaware	n/a	n/a	None
District of Columbia	None	None	Qualified owners of residential realty may apply for deferral each year if residential realty tax owed is in excess of 110% of the preceding year's tax.
Maryland	65 and over	Local limits	Local option for counties and cities to defer property taxes.
New Jersey	n/a	n/a	None
North Carolina	n/a	n/a	None
Pennsylvania	None	\$15,000	Local option to defer property tax increases. A deferral may not be granted if the amount of the deferred taxes, the liens on the residence, and the principal remaining on the taxpayer's mortgage for the residence is greater than 85% of the residence's market value. A deferral also will be denied if the outstanding principal on all mortgages is more than 70% of the residence's market value.
Virginia	65 and over	\$50,000	Local option to provide a deferral of realty taxes if combined net worth, excluding the value of the dwelling and lot, is not over \$75,000. Specific counties, cities, and towns may raise the maximum total combined income.
West Virginia	n/a	n/a	None

Source: National Conference of State Legislatures, Department of Legislative Services

Local Fiscal Effect: Charles County property tax revenues could decrease as a result of the bill. The amount of any decrease cannot be reliably estimated and depends on the nature of any deferral program that is established by the county and the number of participants in a given year. However, based on the fact that very few properties owners use deferral programs, any associated revenue decrease is likely to be minimal. Revenues would increase in the years that any deferred payments are paid back. For fiscal 2006, there are 36,559 owner-occupied properties in Charles County; the average assessment is \$188,452. SDAT indicates that there are currently three property owners using the deferral program in Anne Arundel County.

Additional Information

Prior Introductions: None.

Cross File: None.

Information Source(s): State Department of Assessments and Taxation, Charles County, Maryland Association of Counties, Department of Legislative Services

Fiscal Note History: First Reader - February 13, 2006
ncs/hlb Revised - House Third Reader - March 28, 2006

Analysis by: Michael Sanelli

Direct Inquiries to:
(410) 946-5510
(301) 970-5510

Montgomery County Code
Chapter 52 – Taxation
Section 52-18F

- The amount of taxes that may be deferred for any one year is the amount that County property taxes due exceeds the amount of County property taxes paid in the prior taxable year. The increase in County property tax however, cannot be the result of a substantial improvement to the property.
- The gross income or combined gross income of all individuals who actually reside in the dwelling must not exceed \$120,000 for the preceding calendar year.
- The owner, or at least one of the owners, must reside in the dwelling as the principal place of residence and must have done so for at least 5 years.
- County real property taxes that are eligible for the deferral are the General county tax and Special Service Area taxes.
- Interest accrues on the deferred taxes at a rate set annually by the County that does not exceed the prime lending rate. The annual interest rate set by the County applies to any tax deferred that year, regardless of the year when the tax was first deferred.
- The accumulation of deferred taxes and accrued interest must not exceed 50 percent of the full cash value of the property.
- **All taxes deferred and accrued interest are a first lien on the property. The County must notify all mortgagees of a payment deferral under this Section and of the amount of tax to be deferred.**
- An application for a tax deferral under this Section must be submitted to the Division of Treasury no later than September 1 of the tax year in which the taxpayer seeks to obtain a tax deferral.
- A person who knowingly submits a false or fraudulent application or statement, or withholds information, in order to obtain a deferral under this Section has committed a Class A violation, and must repay to the County deferred taxes and interest and penalties applicable to overdue taxes. A person who violates this section is liable for all court costs and expenses of the County in a civil action.



DIVISION OF TREASURY

255 ROCKVILLE PIKE, SUITE L-15 ROCKVILLE, MARYLAND 20850
240-777-8931

ANNUAL APPLICATION Residential Real Property Tax Deferral - General

IN ORDER TO RECEIVE THE TAX DEFERRAL, THE FOLLOWING INFORMATION MUST BE PROVIDED
AND ALL OF THE REQUIRED ITEMS MUST BE SUBMITTED ALONG WITH THE APPLICATION.

1. Property Owner's Name / Phone # _____
 2. Property Owner's Mailing Address: _____

 3. Property Account Number: _____
 4. Name and contact information of any / all mortgagees of the property or beneficiaries under any deed of trust: _____

 5. Has the owner, or at least one of the owners, of the property resided in the dwelling as that person's principle place of residence for at least 5 years and continue to occupy the property for that purpose: YES / NO
 6. The gross income or combined gross income of all individuals who reside in the dwelling (except for a dependent or a person who pays room & board) is less than \$120,000.00 YES / NO
Must provide copy of Federal Income Tax Return, substantiating gross income for all individuals, from the most recent tax year.
- The applicant(s) does not qualify if the answer to either question 5 or 6 is "NO".
7. Has a property tax deferral been granted through this program before? YES / NO If YES, list the prior tax years deferred: _____

IMPORTANT: Read the back of this form for all applicable terms and conditions relating to this property tax deferral.

I hereby certify under oath and affirmation, subject to the penalties provided by law, that the information and responses in this application are true and correct to the best of my knowledge, information, and belief.

SIGNATURE OF PROPERTY OWNER

APPLICATION DATE

FOR OFFICE USE ONLY

- A. TOTAL CURRENT YEAR COUNTY TAXES DUE (LY2005): _____
- B. TOTAL COUNTY TAXES DUE PRIOR TAXABLE YEAR (LY2004): _____
- C. TOTAL APPROVED TAX DEFERRAL LY2005 (A - B): _____

Residential Real Property Tax Deferral - General

Description

An owner may defer payment of County property taxes due on residential real property occupied by the owner, as the owner's principal residence. The amount of taxes that may be deferred for any one year is the amount that County taxes due exceeds the amount of County property taxes paid in the prior taxable year.

An owner is eligible for a deferral if:

- 1) The gross income or combined gross income of all individuals who actually reside in the dwelling did not exceed \$120,000 for the preceding calendar year.
- 2) The owner, or at least one of the owners must reside in the dwelling as their principal place of residence, and must have done so for at least 5 years.

County real property taxes that are eligible for the deferral are the General County tax and Special Service Area taxes.

Interest accrues on the deferred taxes at a rate set annually by the County, that does not exceed the prime lending rate. The annual interest rate set by the County applies to any tax deferred that year, regardless of the year when the tax was first deferred.

The accumulation of deferred taxes and accrued interest must not exceed 50% of the full cash value of the property.

Authority

Montgomery County Code, Chapter 52, Article I, Section 52-18F

Effective Date

July 1, 2005

Fiscal Impact

Levy	
2007 - \$0	2007 Interest Rate - 8.25%
2006 - \$0	2006 Interest Rate - 8.25%
2005 - \$0	2005 Interest Rate - 6.00%



Acquisition of Old Rockville Post Office & Conversion to City Police Station

Description: The City is in the process of attempting to obtain possession of the two-story post office building located at the corner of S. Washington St. and W. Montgomery Ave., opened in 1939 as Rockville's first permanent post office. The building is 11,415 square feet in size with approximately 8,506 square feet of usable space in its current configuration. The Federal Government (GSA) is in the final stages of the process to convey this building to another owner. This project describes the City's plans to acquire the building and convert its use to the City's main Police Department Headquarters. A due-diligence feasibility study was conducted with the assistance of an architectural/engineering consulting firm. To convert the post office to the proposed law enforcement use, substantial renovations to the interior of the post office building will be necessary; construction of a stand-alone annex building is also proposed. Due to the historic designation of the Post Office, these proposed improvements to the existing building and site must be approved by the Maryland Historic Trust and the Rockville Historic District Commission. The City has investigated an agreement to lease parking from the adjacent office building garage to support the Police use. The owner was amenable and a formal agreement will be negotiated in the future pending acquisition of the Post Office. The project also includes redesign and renovations to leased office space at 20 Courthouse Square that will be converted to Police Department uses.

Mayor & Council Goal - Exceptional City Services

Date Created: 3/20/2006

Project Status: Open

Is this a CIP Project: Yes

Is this project included in the Quarterly Mayor and Council Review Meetings? Yes

	Project Team	Department
Manager	Burt Hall	Recreation and Parks
Team Members	Catherine Tuck Parrish Jeff Winstel Jim Wasilak Terry Treschuk	City Manager Community Planning and Development Services Police

Is there a budget for this project that is separate from standard operating costs? **Yes**

Funding	FY07	FY08	FY09	FY10	FY11	Total
Planned	\$42,700	\$324,980	0	\$6,022,699	0	\$6,390,379
Revised						0
Expended to Date	\$47,953	\$37,850	0	0	0	\$85,803

LEGEND:

★ - Public Involvement

✚ - Mayor and Council Action

	★	✚	Tasks and Milestones	START			END		
				Planned	Revised	Actual	Planned	Revised	Actual
1	-	-	Meet with GSA to discuss their plans and obtain process information	09/27/05	-	09/27/05	09/27/05	-	09/27/05
2	-	-	GSA notifies post office of intent to dispose of the building	10/01/05	-	10/01/05	05/01/06	-	05/01/06
3	-	-	GSA tests building and site for hazmats (bldg may be conveyed with lead paint and asbestos)	10/01/05	-	03/01/06	11/01/05	-	03/01/06
4	-	-	GSA screens other federal agencies to determine acquisition interest	05/15/06	02/09/07	02/09/07	06/15/06	03/08/07	04/02/07
5	Y	-	GSA/HUD advertises in local community for "public benefit" use interest. (Homeless shelters have priority)	07/01/06	03/09/07	04/06/07	08/15/06	04/08/07	07/06/07

6	-	-	GSA notifies City of Rockville, State of MD, Montgomery Co., MCPS, and local accredited public schools of availability of building	03/15/06	05/01/07	05/01/07	07/01/07	05/01/07	05/10/07
7	-	Y	Staff submits draft acquisition application to Mayor and Council for approval prior to submission.	05/21/07	-	05/21/07	05/21/07	-	05/21/07
8	-	-	City submits approved application to U.S. Dept of Justice for acquisition of Post Office Building	06/01/07	-	05/25/07	06/01/07	-	05/25/07
9	-	Y	Staff presents feasibility/due diligence report to M&C, including building condition, feasibility for Police uses, concept renovation designs, parking, capital and operating costs.	03/17/07	07/16/07	07/16/07	03/19/07	07/16/07	07/16/07
10	-	-	If the post office is not transferred to another entity for a "public benefit" use, the City negotiates acquisition with GSA.	05/15/06	11/01/07	11/06/07	07/15/07	06/30/08	-
11	-	-	Staff and A/E consultants present design plans to Maryland Historic Trust for approval of renovation plans for site and building.	12/10/07	05/13/08	05/13/08	12/10/07	05/13/08	05/13/08
12	-	-	City receives letter from MHT Easement Committee denying proposals for improvements to the Post Office building for Police Dept. uses. Annex building addition is approved.	05/26/08	-	05/30/08	05/26/08	-	05/30/08
13	-	-	City works with GSA to appeal MHT decision to deny proposed improvements to Post Office Building.	06/11/08	-	06/11/08	06/30/08	07/25/08	-
14	-	-	City acquires deed to building and property from GSA.	07/01/08	08/01/08	-	07/01/08	08/01/08	-
15	-	-	City negotiates parking lease with adjacent office building to provide parking required for Police use of Post Office.	11/01/07	09/01/08	11/01/07	09/15/08	-	-
16	Y	Y	M&C provides direction to staff based on results of feasibility study.	08/06/07	09/08/08	-	08/06/07	09/08/08	-
17	-	Y	City awards architectural/engineering design contract to qualified firm. Design work to include Post Office and leased offices at 20 Courthouse Square.	09/24/07	09/22/08	-	09/22/08	-	-

18	-	-	Staff works with A/E Consulting firm to design renovations to Post Office and to leased space at 20 Courthouse Square.	09/09/07	09/21/08	-	02/01/08	03/01/09	-
19	Y	-	Staff and A/E Consultants present design plans to HDC for approval on renovation plans for site and building.	02/21/08	03/19/09	-	02/21/08	03/19/09	-
20	Y	-	Staff and A/E Consultants present design plans to Planning Commission for Use Permit Approval.	03/26/08	03/25/09	-	03/26/08	03/25/09	-
21	Y	Y	Staff presents design plans to the Mayor and Council and public - Mayor and Council approve designs and direct staff to proceed with construction bids.	03/10/08	04/20/09	-	03/10/08	04/20/09	-
22	-	-	Construction project is advertised for bidding purposes.	07/15/08	05/12/09	-	07/15/08	06/12/09	-
23	-	-	Construction bids opened.	11/08/08	06/12/09	-	08/15/08	06/12/09	-
24	-	-	Construction of renovations and or additions to post office and 20 Courthouse Square.	09/20/08	06/15/09	-	09/01/09	05/01/10	-

LEGEND:

★ - Public Involvement

☞ - Mayor and Council Action

Notes At their May 21, 2007 meeting the Mayor and Council approved the staff recommendation to continue to work toward obtaining ownership of the Post Office, and to convert it to the City's Police Headquarters. The City submitted its application to the U.S. Department of Justice on May 25, 2007. The Montgomery County Coalition for the Homeless (MCCH), which had applied to take possession of the post office, has withdrawn their application. No other organizations are currently bidding on obtaining the post office. GSA has informed the City that they intend to deed the Post Office to the City for use as a Police Station, and has provided drafts of a Quit Claim Deed (to transfer ownership to the City) and a Historic Easement. GSA will donate the Easement to the Maryland Historic Trust, as the Post Office is on the National Historic Register, and also in a local Historic District.



Water Main Rehabilitation

Description: This project funds the design and construction of water system improvements to upgrade the City's aging water system. Improvements include: rehabbing existing pipes, replacing older pipes and pipes made of spiral-welded steel, increasing the diameter of undersized pipes, and connecting dead end pipe segments. In FY09, upgrades will be designed and constructed in East Rockville, Twinbrook and along Rockville Pike.

Mayor & Council Goal - Exceptional City Services

Date Created: 5/20/2008

Project Status: Open

Is this a CIP Project: Yes

Is this project included in the Quarterly Mayor and Council Review Meetings? Yes

	Project Team	Department
Manager	John Hollida	Public Works
Team Members		

Is there a budget for this project that is separate from standard operating costs? **Yes**

Funding	FY09	FY10	FY11	FY12	FY13	Total
Planned	\$3,825,800	\$5,765,000	\$6,076,000	\$4,731,000	\$4,117,000	\$24,514,800
Revised	0	0	0	0	0	0
Expended to Date	0	0	0	0	0	0

LEGEND:

★ - Public Involvement

☞ - Mayor and Council Action

	★	☞	Tasks and Milestones	START			END		
				Planned	Revised	Actual	Planned	Revised	Actual
1	-	-	N. Horners, Reading Terrace, Crawford, Thornden, Rockland: Draft Surveying RFP	-	-	-	-	-	02/25/08
2	-	-	N. Horners, Reading Terrace, Crawford, Thornden, Rockland: Hire Surveyor	-	-	-	-	-	04/03/08
3	-	-	N. Horners, Reading Terrace, Crawford, Thornden, Rockland: Neighborhood Advisory (begin field survey)	-	-	-	-	-	04/11/08
4	-	-	N. Horners, Reading Terrace, Crawford, Thornden, Rockland: Surveying kick-off meeting	-	-	-	-	-	05/01/08
5	-	-	N. Horners, Reading Terrace, Crawford, Thornden, Rockland: Water Main Field Survey	-	-	05/05/08	08/29/08	-	-
6	-	-	Draft IFB #02-09 Requirements Construction Contract, Water Main Upgrades	-	-	05/12/08	06/27/08	-	06/27/08
7	-	-	Rockville Pike and Park Road: Steel Water Main Replacement IFB #62-08. Construction Award	-	-	06/03/08	07/07/08	-	07/07/08
8	-	-	N. Horners, Reading Terrace, Crawford, Thornden, Rockland: Water Main Design	06/23/08	-	06/23/08	09/30/08	-	-

9	-	-	Advertise IFB #02-09 Requirements Construction Contract, Water Main Upgrades	07/02/08	-	07/02/08	08/12/08	-	-
10	-	-	Pre-bid Meeting for IFB #02-09 Requirements Construction Contract, Water Main Upgrades	07/17/08	-	-	07/17/08	-	-
11	-	-	Rockville Pike and Park Road: Steel Water Main Replacement IFB #62-08. Construction	08/11/08	-	-	01/12/09	-	-
12	-	-	Award IFB #02-09 Requirements Construction Contract, Water Main Upgrades	08/12/08	-	-	09/08/08	-	-
13	-	-	N. Horners, Reading Terrace, Crawford, Thornden, Rockland: Construction Advisory	09/09/08	-	-	11/14/08	-	-
14	-	-	N. Horners, Reading Terrace, Crawford, Thornden, Rockland: Water Main Construction	10/13/08	-	-	06/30/09	-	-

LEGEND:

- ★ - Public Involvement
- ✎ - Mayor and Council Action

Notes



Water Meter Replacement Program-Residential

Description: The City will purchase and replace about 11,000 residential meters throughout the City. These meters are Sensus radio-read, an updated technology which will improve billing accuracy and increase efficiency. A contractor will install most of the meters.

Mayor & Council Goal - Exceptional City Services

Date Created: 3/5/2008

Project Status: Open

Is this a CIP Project: Yes

Is this project included in the Quarterly Mayor and Council Review Meetings? Yes

	Project Team	Department
Manager	Ilene Lish	Public Works
Team Members	Jason Zimmerman John Joppey Mike Wilhelm	Finance Public Works

Is there a budget for this project that is separate from standard operating costs? **Yes**

Funding	FY08	FY09	FY10	FY	FY	Total
Planned	\$1,900,000	0	\$1,600,000	0	0	\$3,500,000
Revised	0	0	0	0	0	0
Expended to Date	0	0	0	0	0	0

LEGEND:

★ - Public Involvement

☞ - Mayor and Council Action

	★	☞	Tasks and Milestones	START			END		
				Planned	Revised	Actual	Planned	Revised	Actual
1	Y	Y	Presented at the 5/19/08 Mayor and Council Mtg: Bid Award to Vanguard Utility Service, Inc. and Sole Source Purchase of meters from L/B Water Service, Inc. Both were approved.	05/19/08	-	05/19/08	05/19/08	-	05/19/08
2	Y	-	Issue Purchase Order for 5,309 water meters and misc. parts from L/B Water Service, Inc.	05/30/08	-	05/30/08	06/12/08	-	06/12/08
3	Y	-	Vanguard Utility Service, Inc. will install water meters.	07/07/08	-	07/07/08	10/30/08	-	-

LEGEND:

★ - Public Involvement

☞ - Mayor and Council Action

Notes



Video on Demand System

Description: This project will make video of Mayor and Council meetings and other selected programs of The Rockville Channel available on the City's Web site at the convenience of the viewer. The system will allow a person to click on the agenda item of a previous Mayor and Council meeting and see and hear the discussion of that item. After implementation for Mayor and Council meetings, the system is planned to develop a similar feature for Planning Commission meetings. Visitors to the City's Web site also will be able to click on and watch other TRC programs, such as news, interviews, features and public service announcements, at their convenience.

Mayor & Council Goal - Community Engagement

Date Created: 10/23/2007

Project Status: Open

Is this a CIP Project: No

Is this project included in the Quarterly Mayor and Council Review Meetings? Yes

	Project Team	Department
Manager	Doug Breisch	Information and Technology
Team Members	Betsy Robbins Bridget Broullire Claire Funkhouser Doug Breisch Hagop Balekjian Mike Cannon Tina Marcinkus	City Clerk City Manager Information and Technology

LEGEND:

★ - Public Involvement

☞ - Mayor and Council Action

	★	☞	Tasks and Milestones	START			END		
				Planned	Revised	Actual	Planned	Revised	Actual
1	-	-	Meet with Granicus and team	01/11/08	-	12/19/07	01/11/08	-	12/19/07
2	-	-	Get revised quote/contract from Granicus	01/18/08	-	12/20/07	01/18/08	-	12/20/07
3	-	-	Confirm budget availability, Submit Purchase Requisition and Related Documents, Contract/Document Review, Negotiation	01/21/08	-	01/15/08	02/01/08	-	03/11/08
4	-	-	Award Contract	02/08/08	-	03/11/08	02/08/08	-	03/11/08
5	-	-	Kick off conference call	04/17/08	-	04/17/08	04/17/08	-	04/17/08
6	-	-	Initial Web design Review	04/24/08	-	04/24/08	04/24/08	-	04/24/08
7	-	-	Hardware and Software Installation	02/18/08	05/09/08	05/16/08	03/28/08	05/19/08	05/28/08
8	-	-	IT/TV Architecture	04/23/08	-	04/23/08	04/23/08	-	04/23/08
9	-	-	Deployment Validation	05/28/08	-	05/22/08	05/28/08	-	05/22/08
10	-	-	Onsite Training	06/09/08	-	06/09/08	06/16/08	-	06/16/08
11	-	-	System Useage and workflow review	06/05/08	-	-	-	-	06/05/08
12	-	-	Activate New VOD System for M&C Meetings	03/31/08	06/30/08	-	03/31/08	06/30/08	06/30/08
13	-	-	Activate for other selected programs	04/14/08	07/17/08	-	07/17/08	-	-

14	-	-	Activate for Planning Commission Meetings	09/03/08	-	-	09/03/08	-	-
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LEGEND:

* - Public Involvement

†† - Mayor and Council Action

Notes



E-Newsletter

Description: The City of Rockville is seeking to use an e-newsletter to provide targeted information through public engagement. The premise of the e-newsletter will allow the City to create specific messages that residents can select. The goal is to foster more two-way communications within the organization and outside of the organization. Procedures for content inclusion and dissemination must be developed.

Mayor & Council Goal - Community Engagement

Date Created: 12/24/2007

Project Status: Open

Is this a CIP Project: No

Is this project included in the Quarterly Mayor and Council Review Meetings? Yes

	Project Team	Department
Manager	Marylou Berg	City Manager
Team Members	Communications and Public Information Division	City Manager

LEGEND:

★ - Public Involvement

☐ - Mayor and Council Action

	★	☐	Tasks and Milestones	START			END		
				Planned	Revised	Actual	Planned	Revised	Actual
1	Y	-	Communication and Public Information Division, Catherine Tuck Parrish, and Jenny Kimball participated in phone conference with Illinois-based Subscribermail. Team received online demo	12/11/07	-	12/11/07	12/11/07	12/11/07	12/11/07
2	Y	-	Team researching ride on contract to obtain Subscribermail's services	01/05/08	-	02/29/08	01/05/08	-	02/29/08
3	-	-	Researched additional e-newsletter options. Found "Constant Contact" - an e-newsletter and survey company with a free 60-day limited trial.	03/11/08	-	03/11/08	05/12/08	-	-
4	Y	-	Recommend starting a free-trial in-house by circulating a sample sign-up form, newsletter and survey for staff review and feedback	03/17/08	03/25/08	03/25/08	04/15/08	-	03/31/08
5	Y	-	Sample preview of newsletter circulated for staff review and comment.	03/31/08	-	03/31/08	03/31/08	-	03/31/08
6	Y	-	Two meetings set up with Montgomery County and MCPS Web staff to share ideas and brainstorm on e-newsletter solutions.	06/18/08	-	06/18/08	06/24/08	-	06/24/08
7	Y	-	Once a e-newsletter provider is selected, advertise to public (via Rockville Reports, news release and existing listservs) to build a subscriber list.	07/01/08	-	07/01/08	07/01/08	-	07/01/08

8	-	-	Initial newsletter to be Recreation events, sent out weekly.	08/01/08	-	-	-	-	-
9	Y	-	Content discussion and category analysis with dept. heads/project managers for future issues.	02/04/08	08/01/08	-	09/01/08	-	-

LEGEND:

* - Public Involvement

⌘ - Mayor and Council Action

Notes